

What Is Claimed Is:

1 1. A method for determining taxes for a transaction by applying tax
2 rules specified using configurable templates, comprising:
3 receiving the transaction for which taxes are to be determined;
4 examining a configurable template associated with a tax rule, wherein the
5 configurable template identifies a set of attributes associated with the transaction;
6 examining a set of conditions for the set of attributes; and
7 if each condition in the set of conditions is satisfied, using a process result
8 associated with the set of conditions in determining a tax for the transaction.

1 2. The method of claim 1, wherein if the set of conditions is not
2 satisfied and if an alternative set of conditions for the set of attributes is satisfied,
3 the method further comprises using an alternative process result associated with
4 the alternative set of conditions in determining the tax for the transaction.

1 3. The method of claim 1, wherein if the tax rule does not apply to the
2 transaction and additional tax rules exist, the method further comprises attempting
3 to apply the next tax rule in the order of precedence in the process of determining
4 and/or the transaction.

1 4. The method of claim 3, wherein the additional tax rules are applied
2 in a sequence determined by a precedence ordering of the additional tax rules.

1 5. The method of claim 4, wherein the precedence ordering allows the
2 user to configure the system in a way that more specific tax rules are applied
3 before more general tax rules are applied.

1 6. The method of claim 1, further comprising allowing a user to
2 modify configurable templates associated with the tax rules.

1 7. The method of claim 1, wherein the tax rule specifies whether or
2 not a specific tax is applicable to the transaction.

1 8. The method of claim 1, wherein the tax rule specifies a tax rate that
2 is used determining in the tax amount for a tax applicable to the transaction.

1 8. The method of claim 1, wherein the tax rule specifies a tax status
2 that is used determining in the tax amount for a tax applicable to the transaction.

1 9. The method of claim 1, wherein the tax rule specifies a taxable
2 basis formula that is used in determining the tax amount for a tax applicable to the
3 transaction.

1 10. The method of claim 1, wherein the tax rule specifies a tax
2 calculation formula that is used in determining the tax amount for a tax applicable
3 to the transaction.

1 11. The method of claim 1, wherein the tax rule specifies a tax
2 recovery rate that is used in determining the tax recovery amount for a tax
3 applicable to the transaction.

1 12. The method of claim 1, wherein the tax rule specifies a result that
2 is used in determining the outcome of any process of determining or administering
3 taxes that are applicable to the transaction.

1 13. The method of claim 1, wherein determining the tax for the
2 transaction involves:
3 determining which taxes are applicable to the transaction;
4 determining a taxable basis for the transaction;
5 determining an applicable tax rate for the transaction; and
6 calculating the tax for the transaction.

1 14. The method of claim 1, wherein different sets of tax rules can be
2 associated with different local jurisdictions.

1 15. The method of claim 1, wherein the tax rule, the configurable
2 template and the set of conditions reside in a database.

1 16. The method of claim 1, wherein the tax rules specified using
2 configurable templates are applied to processes other than determining taxes such
3 as processes of administering taxes.

1 17. The method of claim 1, wherein the tax rules specified using
2 configurable templates may be applied to a few but not all processes for
3 determining or administering taxes.

1 18. The method of claim 1, wherein the system allows tax rules to be
2 created for a hierarchy of tax regimes in such a way as to allow the specification
3 of a general rule for a higher-level regime, and increasingly specific rules down
4 the regime hierarchy to the level of taxes in the lowest level of regime.

1 19. The method of claim 1, wherein the system allows tax rules to be
2 defined for subscribers according to an open subscription model that allows
3 sharing of rules across subscribers in a subscription hierarchy

1 20. A computer-readable storage medium storing instructions that
2 when executed by a computer cause the computer to perform a method for
3 determining taxes for a transaction by applying tax rules specified using
4 configurable templates, the method comprising:
5 receiving the transaction for which taxes are to be determined;
6 examining a configurable template associated with a tax rule, wherein the
7 configurable template identifies a set of attributes associated with the transaction;
8 examining a set of conditions for the set of attributes; and
9 if each condition in the set of conditions is satisfied, using a process result
10 associated with the set of conditions in determining a tax for the transaction.

1 21. The computer-readable storage medium of claim 20, wherein if the
2 set of conditions is not satisfied and if an alternative set of conditions for the set
3 of attributes is satisfied, the method further comprises using an alternative process

4 result associated with the alternative set of conditions in determining the tax for
5 the transaction.

1 22. The computer-readable storage medium of claim 20, wherein if the
2 tax rule does not apply to the transaction and additional tax rules exist, the method
3 further comprises attempting to apply the additional tax rules to the transaction.

1 23. The computer-readable storage medium of claim 22, wherein the
2 additional tax rules are applied in a sequence determined by a precedence ordering
3 of the additional tax rules.

1 14. The computer-readable storage medium of claim 23, wherein the
2 precedence ordering causes more specific tax rules to be applied before more
3 general tax rules are applied.

1 15. The computer-readable storage medium of claim 20, wherein the
2 method further comprises allowing a user to modify configurable templates
3 associated with the tax rules.

1 26. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies whether or not a specific tax is applicable to the transaction.

1 27. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a tax rate that is used determining the tax for the transaction.

1 28. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a tax status that is used determining in the tax amount for a tax
3 applicable to the transaction.

1 29. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a taxable basis formula that is used in determining the tax
3 amount for a tax applicable to the transaction.

1 30. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a tax calculation formula that is used in determining the tax
3 amount for a tax applicable to the transaction.

1 31. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a tax recovery rate that is used in determining the tax recovery
3 amount for a tax applicable to the transaction.

1 32. The computer-readable storage medium of claim 20, wherein the
2 tax rule specifies a result that is used in determining the outcome of any process of
3 determining or administering taxes that are applicable to the transaction.

1 33. The computer-readable storage medium of claim 20, wherein
2 determining the tax for the transaction involves:
3 determining which taxes are applicable to the transaction;
4 determining a taxable basis for the transaction;
5 determining an applicable tax rate for the transaction; and
6 calculating the tax for the transaction.

1 34. The computer-readable storage medium of claim 20, wherein
2 different sets of tax rules can be associated with different local jurisdictions.

1 35. The computer-readable storage medium of claim 20, wherein the
2 tax rule, the configurable template and the set of conditions reside in a database.

1 36. The computer-readable storage medium of claim 20, wherein the
2 tax rules specified using configurable templates are applied to processes other
3 than determining taxes such as processes of administering taxes.

1 37. The computer-readable storage medium of claim 20, wherein the
2 tax rules specified using configurable templates may be applied to a few but not
3 all processes for determining or administering taxes.

1 38. The computer-readable storage medium of claim 20, wherein the
2 system allows tax rules to be created for a hierarchy of tax regimes in such a way
3 as to allow the specification of a general rule for a higher-level regime, and
4 increasingly specific rules down the regime hierarchy to the level of taxes in the
5 lowest level of regime.

1 39. The computer-readable storage medium of claim 20, wherein the
2 system allows tax rules to be defined for subscribers according to an open
3 subscription model that allows sharing of rules across subscribers in a
4 subscription hierarchy

1 40. An apparatus that determine taxes for a transaction by applying tax
2 rules specified using configurable templates, comprising:

3 a receiving mechanism that is configured to receive the transaction for
4 which taxes are to be determined;
5 a retrieval mechanism that is configured to retrieve a configurable
6 template associated with a tax rule, wherein the configurable template identifies a
7 set of attributes associated with the transaction;
8 wherein the retrieval mechanism is additionally configured to retrieve a set
9 of conditions for the set of attributes; and
10 a tax determination mechanism that is configured to use a process result
11 associated with the set of conditions in determining a tax for the transaction if
12 each condition in the set of conditions is satisfied.